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# Used Car Business

BUSINESS PLAN

BUDGET CARS

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*145 Water Street  
Alpena, MI 49707*

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*This business plan addresses all relevant concerns by presenting a comprehensive account of a month-by-month marketing strategy coupled with an extensive report on all aspects of the needs of a successful used car center. The care and detail of the financial figures assures a well-thought and carefully considered proposition. Note the effort to make the lender comfortable and familiar with the staff.*

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# USED CAR BUSINESS BUSINESS PLAN

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## SUMMARY

### A. Description of the business

- 1. Mission**—The mission of Budget Cars will be to buy and sell a desirable mix of quality used cars, trucks, and vans, and to create a friendly atmosphere where Budget Cars will be known for being your family used car center.
- 2. Legal Status/Location**—The legal status of Budget Cars is a subchapter “S” corporation. The location is in Alpena, Michigan.

**B. Products and Services**—The products that Budget Cars will offer are quality used cars, trucks, and vans at below market value. The services that will be offered are in-house financing provided by area banks with approved credit and a full automotive detail center that will recondition all units for sale.

### C. Market and Sales Strategy

Due to several different factors (season changes, market changes, opening date, etc.), our advertising strategies are going to vary accordingly. We are going to be consistent with our advertising in the “Out and About” section that runs every other week in the *Alpena Journal* and at least one ad once a month in the *Daily Herald*.

January 15, 1997—Our goal is to open the doors and start our advertising in the “Out and About” section of the *Alpena Journal*, \$40.00 each run, reaching 5,000 homes, and an ad in the *Daily Herald*.

February—First week, buy the front page of the *Daily Herald*, \$525.00, reaching 17,000 homes and continue with every other week in the *Alpena Journal*. Also concentrate on 3 spots a week in the classifieds, about \$27.00 per week.

March—This month we’ll continue our “Out and About” section, 3 spots a week in the classifieds, and at least one ad in the *Daily Herald* to keep in contact with the out county.

April—“Grand Opening” will be held this month. With the snow gone and everyone ready for a cookout, we’ll have our “Family Festive.” Included in this will be a tent, grilling hot dogs, contacting acquaintances with “Victorian” cars, and asking them to bring them to the lot for display. Also, the “Out and About” section and the ads in the classifieds will be run along with an ad in the *Daily Herald*.

May, June, and July—We’ll start with a little radio advertising, maybe sponsoring a morning weather program and continuing with our “Out and About” section and an ad in the *Daily Herald*. As for the classifieds, we’ll determine at that time if they are worth using.

August, September, and October—Still keeping with radio, sponsor a local high school sport and continue the “Out and About” section and an ad in the *Daily Herald*.

November—We’ll go with the “Out and About” section and the ad in the *Daily Herald* and determine if it’s time to advertise in the classifieds.

December—Have a coloring contest for the kids, with prizes that tie in with the holidays, advertising in the *Alpena Journal* and the *Daily Herald*.

Budgeting \$575.00 a month, a total of \$6,900.00 a year, this should be a realistic dollar amount and provide us with plenty of exposure.

**D. Management Team and Responsibilities**—The management team members are Ben Heath, Margerie Heath, and Peter James, with Ben ultimately being the leader. Margerie's responsibilities will include F&I, bookkeeping, answering and routing phone calls and payroll. Peter will be maintaining and operating the automotive detail center. Ben will be responsible for the buying and selling of automobiles and overseeing all operations.

The number one responsibility of our management team is to create a friendly atmosphere where our customers come first. They will always be courteously acknowledged with a friendly smile and a handshake.

#### E. Objectives of the Management Team

1. Our main objective is to buy and sell 180 quality used vehicles in the first year of operation, with an increase per year of 60 vehicles, ultimately reaching an average of 300 cars per year.
2. We project \$171,000.00 in gross profit for the first year, making that a \$950.00 per unit gross after marketing sales expense is deducted, increasing accordingly with the number of units sold per year to reach our \$315,000.00 gross profit by the fourth year.

#### F. Financial Considerations

**1. Profit Projections**—Budget Cars will have a net profit in the first year of operations.

**2. Balance Sheet Projections**—We are projecting an increase of net worth of the business by \$39,154.05.

**A. Initial Products and Services**—When we first open in January 1997, if the weather is typically like most northern Michigan winters, there will be snow on the ground. Purposely the inventory will be minimal and focus on 4x4 trucks, utility units, and a family budget row of used cars that will satisfy the second car needs.

**B. Need for the Product and Service**—With the prices of new vehicles reaching an average of \$20,000.00 plus, and continually raising each year, the used car, truck, and van market has become stronger. That's why Budget Cars is opening their doors in January 1997 to take a share of the market which is wide open in this area.

**C. Major Suppliers**—A majority of the vehicles that Budget Cars will offer will come from auctions and new car dealerships. The auctions will be our major suppliers of late model vehicles and the new car dealerships will be an access to the vehicles we can offer between \$3,000.00 - \$7,500.00. Other vehicles will come from trade-ins and private purchase units.

**A. Background of the Industry**—Immediately following World War II, there were roughly nine buyers for every new car produced. Sales personnel merely had to find out who could afford a new car. "Afford" was defined as paying cash. This condition existed until the early 1950s when supply began to discover that some new terms were creeping into the retail salesperson's vocabulary. Words like "overallowance," "discount," "deal," and "terms." The emphasis, however, was still not on product but on price. In addition, the asking price was no longer final. There was also, if you could haggle a little, a taking price. It was possible to bargain with the dealer for the first time.

During the 1960s, other new merchandising techniques were introduced. "Sticker price," "fleet price," "hard sell," "50 over invoice," "high-powered advertising," and "free" accessories were but a few new innovations. The buyer was becoming better educated, better able to buy—thanks to 24- and 36-month payments—but still confused and fearful of price. "Good

#### PRODUCTS AND SERVICES

#### INDUSTRY DESCRIPTION

deals" became "bad deals" after talking to friends and neighbors. Caution became the watchword when buying a car.

The advent of the 1970s brought more confusion to buyers with new procedures like leasing, 48-month payments, credit unions, rebates, and consumer advocates. However, in defense of the consumer, books on "How to Buy a Car," "Invoice Prices U.S. Cars," and "Used Car Buyers Guide," were published and sold by the millions.

During the 1970s automobile salespeople became conditioned to the notion that customers were interested in only one thing—the very lowest price. The automobile showroom atmosphere didn't change very much from the 1970s to the 1980s. Most retail salespeople saw the business of selling automobile as an "us against them" hard-sell game. Those who sold popular Japanese products became arrogant and insensitive to their customers and those of us who sold American vehicles continued with the approach that price, and price alone, sells vehicles.

As the 1980s came to a close, however, the winds of change began to impact the retail automobile marketplace. Today, in the mid 1990s, the business of retailing automobiles is quite different than it has ever been in the past.

In today's marketplace, 5 out of every 6 cars sold in the United States are used.

**B. Trade Association Assistance**—Federal Register offers assistance with compliance guidelines for used car rules and (NADA) National Auto Dealers Association offers assistance.

**C. Industry Trends**—Vehicle sales seems to be a trend with our Michigan seasons. While the sun is shining and the temperatures are warm, outdoor family activities become more popular, encouraging camping, vacations, and sight seeing. These activities increase the demand for minivans, station wagons, and sport utility vehicles. As the kids head back to school and the weather turns cold, road conditions deteriorate. This creates demand for a more rugged, durable unit such as light duty trucks and vans. The extra security of four-wheel drive is also more popular during this season.

**D. Number and Kind of Businesses in the Area in the Industry**—There are four new car dealerships in Alpena that offer a line of used vehicles. There are also three used car lots in town offering a very limited selection of units.

#### **E. Major Influences on the Industry**

**1. Government Regulations**—An important regulation of the government is to obtain and maintain a class "B" license. The Federal Trade Commission also publishes rules and regulations for operating a used car lot. The used car rule has four basic components. (1) Prepare and display a Buyers Guide on each used vehicle offered to the consumer. (2) To include a special disclosure in the contract of sale. (3) To identify the final warranty terms in the contract of sale. (4) To give the purchaser a copy of the Buyers Guide that includes the final warranty terms.

**2. Business Cycle**—Ups and downs go with any industry, but with the sale of used vehicles there seems to be more of a plateau. When the economy is good, sales are great. When the economy is sluggish, used cars are still in demand because of their price factor.

## A. Who Is the Customer?

- 1. Customer Profile**—Budget Cars will be focusing on three customer profiles. One being a first-time buyer, age 16-25, next being the middle-class family looking for a second car, and third, age 50 and over low-income adults.
- 2. Buying Decision Determinants**—After presenting to the customer quality used vehicles that have been safety checked, backed with a warranty and a competitive low price, the main determinant that we believe will bring the customer to the close is working one on one with the owners and their honesty and reputations.
- 3. Customer Awareness of Product/Service**—Our advertising campaign will ensure that the customer knows who and where we are. Our up close and personal interview process will be a thorough, detailed, step-by-step explanation of our product and commitment to our customers' needs.

## B. Market Size

- 1. Geographic**—Our primary source of customer base will come from the local and surrounding counties. Starting from our location in Alpena, all of the counties are within a thirty-mile radius.
- 2. Population**—The total population of our targeted customer base is 93,945 people. Using Alpena as a comparison, according to the Census taken in 1990, the total population of Alpena County was 21,265. The number of 18- to 25-year-olds was 1,547, the number of people 25-54 was 8,344, leaving a total of 6,273 over the age of 55. The percentage of population that was over the age of 18 at that time was 76%.
- 3. Sales**—A statistic taken in 1990 determined the number of vehicles available per occupied housing unit in Alpena County. Of 8,580 housing units, 777 had no means of motorized transportation, 3,132 owned one vehicle, 3,346 housing units owned two vehicles, and 1,325 had three or more. In order for Budget Cars to reach its projected first-year goal of 15 units per month, only 2.4% of the Alpena market needs to be cornered. Any units sold to customers within the rest of the targeted counties will be additional business.

## C. Market Growth

An estimated population increase throughout our targeted counties can only mean more people with a need for transportation. There was a population increase from 21,265 to 27,912 in Alpena County by 1995.

## D. Competition

- 1. Who's the Competition in Alpena?**
  - a. New and Used Car Dealerships
    1. Jenson's Sales and Service
 

Dodge, Chrysler, Jeep, Eagle, and used vehicles
    2. Alpena Ford Mercury
 

Ford, Mercury and used vehicles
    3. Boji Buick Pontiac Oldsmobile GMC
 

Buick, Pontiac, Oldsmobile, GMC Trucks, and used vehicles
    4. Miller Chevrolet Cadillac Geo
 

Chevrolet, Cadillac, Geo, and used vehicles
  - b. Used Vehicle Dealers Only
    1. Car Trade Center
    2. Thunderbird Auto
    3. Jake's Auto Parts

- 2. Strengths and Weaknesses of the Competition**—Jenson's Sales and Service is selling new and used cars on a more relaxed approach. Alpena Ford Mercury is

## MARKET DEFINITION

aggressive in both new and used vehicle sales, with the majority of their used cars being higher priced program cars. Boji's is focused on new car sales. Miller offers new and used vehicles but are not very aggressive. There are three older used car lots in town that maintain a "B" license. Selling cars is not their main source of income. Very little, if any, priority is given to car sales.

**E. Pricing**—Budget Cars is in a better position than our larger competitors because the overhead is much lower. All deals will be conducted between the owner and customer with no commission paid salesperson taking a cut from the profit made on the deal. The clean-up and reconditioning of all vehicles will be completed in-house. This way we will be able to beat the larger dealers' prices every time and still make enough profit to maintain business expenses and build capital for future expansion. Our main goal will be to sell more for less and be known as "Your Family Used Car Center."

## MARKETING PLAN

**A. Marketing Overview**—Budget Cars plans to focus on young first-time auto buyers, families with second car needs, and low-income adults aged 50 and over. To capture this market we plan to advertise with the local newspaper and radio. But, more importantly, is the support and participation that we will show in community activities.

**B. Marketing Objectives**—Budget Cars's main marketing objective is to focus on the customers' wants and needs and, at the same time, maintain a marketable selection of vehicles at all times. This will allow us to effectively influence and persuade them to buy.

### C. Marketing Strategy

**1. Advertising**—Our main advertising strategy is to let our potential customer know that we are aware of their wants and needs and have quality inventory and prices. To prove it, we will let them know that if we don't have what they're looking for, we'll get it.

**2. Marketing Budget**—From the time that Budget Cars takes possession, until the point of sale, the marketing budget will average \$300.00 per unit. This includes the driver's expense, a safety check, repair work, if needed, reconditioning, and all forms and documents used to track market trends.

## OPERATIONS

**A. Facility Requirements**—The ideal facility for Budget Cars is a highly visible location with a lot large enough to hold 30 units and enough space for customer parking. Also, we will need a building large enough to house a reconditioning center and a sales floor with several private offices.

### B. Equipment Requirements

**1. Reconditioning Department**—The equipment needed for this area will be a rug doctor, shop vacuum, stripping wheel, six-foot ladder, hose and nozzle, buffer, heat gun, miscellaneous small tools, and a plow vehicle for snow removal.

**2. Office and Sales Department**—The equipment needed for this area will be two desks, nine chairs, one computer and printer, one fax machine, two phones, copy machine, two calculators, and a coffee machine.

**C. Labor Requirements**—Budget Cars will have two salaried owners as their main operators. Ben will be manning the sales and Peter will take care of the reconditioning department. Margerie, a full-time employee, will be handling the office duties.

**A. Legal Status**—Budget Cars will be a subchapter “S” corporation.

**B. Business Advisors**

**1. Accountant**—William P. Johnson of William P. Johnson Company PC CPAs, Alpena, Michigan, will be Budget Cars’ accountant.

**2. Insurance**—Cheryl Booker and Robert Ordowski of The Floyd Agency, Alpena, Michigan, will be Budget Cars’ insurance agents.

**3. Consultant**—Phillip J. West of Alpena Community College, Alpena, Michigan, has been a consultant for Budget Cars.

**A. Start-Up Costs**—The start-up cost for Budget Cars will be \$9,994.00. This figure includes office supplies, \$377.00; marketing and reconditioning, \$4,215.00; accounting and legal, \$1,350.00; rental security deposit, \$1,100.00; insurances, \$1,575.00; gas expenses, \$300.00; car phone and pager, \$100.00; Chamber of Commerce dues, \$177.00; and improvements to location, \$800.00.

**B. Sources/Uses of Funds**—Personal funds, a \$25,000.00 ten-year loan and \$150,000.00 of floor plan will be used to operate the business.

**C. Summary of Financial Projections**

**1. Cash Flow Projections**—Budget Cars foresees no cash flow projection problems.

**2. Profit/Loss Projections/Breakeven Analysis**—The Company expects to have a gross profit the first year of \$60,237.00.

**3. Balance Sheet Projections**—Budget Cars projects an increase of net worth the first year to be \$39,154.05.

**A. Business Location**—Budget Cars will be located in Alpena, Michigan.

**B. Location Costs**—The lease of the building will be \$600.00 per month for two years.

**C. Licenses, Permits and other Regulations**—Budget Cars will need a class “B” dealership license, a sales tax I.D. number, and a city permit for the opening.

**D. Insurance Needs**—Budget Cars will need Fleet Insurance, Workman’s Compensation, Renters’ Insurance, and will be carrying health insurance for the shareholders.

This chart is a projection of our monthly cash flow after expenses. These figures have been meticulously researched and should be very close to the actual amounts. A start-up cost of \$9,994.00 has not been included with these calculations.

**COMPANY STRUCTURE**

**FINANCIAL PLAN**

**LOCATION**

**Income Statement**

**Projected Yearly Gross Profit**

This chart shows the average gross profit per unit and the profit potential with volume. Budget Cars has established goals in gross profit and volume for the next four years.

**Projected Yearly Gross Profit (with sales marketing expenses deducted)**

Per Month	Average # of Units		Average Profit Per Unit				
	900	950	1000	1050	1100	1150	
15	162,000	171,000	180,000	189,000	198,000	207,000	
17	183,600	193,800	204,000	214,200	224,400	234,600	
18	194,400	205,200	216,000	226,800	237,600	248,400	
20	216,000	228,000	240,000	252,000	264,000	276,000	
23	248,400	262,200	276,000	289,800	303,600	317,400	
25	270,000	285,000	300,000	315,000	330,000	345,000	

**Projected Monthly Material Expenses**

This chart shows the materials required monthly for the clean-up and reconditioning of 15 safety-checked units.

**Projected Monthly Material Expenses Based on 15 Units**

AMOUNT REQ.	ITEM DESCRIPTION	PRICE EACH	TOTAL
2 Gallons	Tire Dressing	25.00/Gal.	50.00
2 Gallons	Interior Cleaner	10.50/Gal	21.00
2 Gallons	Mag Wheel Cleaner	15.50/Gal	31.00
1 Gallon	Window Cleaner	9.00/Gal	9.00
1/4 Gallon	Miracle Wax	24.00/Gal	6.00
1/4 Gallon	Rubbing Compound	16.00/Gal	4.00
1/2 Gallon	Bug Remover	10.50/Gal	5.25
4 Each	Buffing Pads	4.50/each	18.00
3 Each	Stripping Pads	8.50/each	25.50
6 Each	Interior Paint	4.50/each	27.00
6 Each	Semi Gloss Paint	3.00/each	18.00
1/4 Gallon	Interior Deodorant	21.00/Gal	5.25
3 Gallons	Wash Soap	12.50/Gal	37.50
1 Each	Chamois	20.00/each	20.00
2 Gallons	Mineral Spirits	5.00/Gal	10.00
1/4 Package	Razor Blades	12.00/each	3.00
1 Case	Paper Towels	18.00/Case	18.00
5 Each	Wax Applicator	2.00/each	10.00
1/2 Roll	Polishing (Cheese) Cloth	30.00/Roll	15.00
6 Each	Touch up Paint	4.00/each	24.00
<b>TOTAL</b>			<b>357.50</b>

(These figures are included in the Sales Marketing Expense.)

This list includes the necessary steps to take when acquiring a Class "B" Dealers License.

### Class "B" Licensing Requirements

Original Application  
Assumed Name and/or Corporate Filing  
Fingerprint Cards  
Sketch or Photo of Business Location  
Zoning Approval  
Sheriff or Police Signature  
Repair Facility or Service Agreement  
Sales Tax License  
Secretary of State Branch Designation  
Fleet Insurance  
2 Dealer Plates (Minimum)  
\$10,000 Vehicle Dealer Surety Bond

### Class "B" Licensing Requirements

This chart shows the number of vehicles per housing unit in Alpena County. We only need 2.4% of this market to reach our first-year gross profit goal.

### Number of Vehicles Available per Household

Townships	Occupied Housing Units	None	One	Two	Three or More
Ashland	245	8	89	99	49
Botten	544	24	158	248	114
Cathro	199	0	40	92	67
Grass Island	244	25	73	107	39
Herron	316	20	140	112	44
Hubbard Lake	763	40	241	333	149
Lachine	2,896	492	1,256	888	260
Leer	1,092	33	350	505	204
Long Rapids	449	43	162	172	72
Metz	108	2	43	31	32
Ossineke	470	34	166	198	72
Polaski	521	36	163	208	114
Posen	257	3	98	122	34
Presque Isle	200	7	63	91	39
Sprat	276	10	90	140	36
<b>Alpena County</b>	<b>8,580</b>	<b>777</b>	<b>3,132</b>	<b>3,346</b>	<b>1,325</b>

Source: United States 1990 Census (April 1, 1990) summary tape file 3A. Tables compiled by the Alpena County Planning Department for Alpena County Planning Department for Alpena County municipalities.

Resumes and personality profiles of Budget Cars's management team.

### BEN HEATH

### CAREER GOAL

To own and operate a successful used-car dealership that I can devote all my energy and enthusiasm to.

### RESUMES AND PERSONALITY PROFILES

## WORK EXPERIENCE

Pine Country Ford, August 1986 - October 1990/July 1996 - Present (Sales Manager / Consultant)

\*Create and maintain a diverse customer base \*Conduct telephone interviews with potential customers \*Maintain a thorough knowledge of all current inventory \*Determine which inventory is marketable and contact buyers that may be interested \*Persuade buyers into a one-on-one meeting \*Recognize and satisfy customers' wants and needs \*Assist customers in determining which vehicle and financing terms best fit their needs \*Be the connecting link between the buyer and dealer while settling on a price which satisfies all parties involved

Alpena Ford Mercury, January 1991-June 1996 (Sales Consultant / Sales Manager)

\*Oversee all sales operations to include showroom, display lot, and reconditioning shop \*Appraise trade-in vehicles and offer a fair price that will encourage a sale and create a marketable trade-in \*Order new vehicles from factory for retail and dealership inventory \*Create a positive, enthusiastic atmosphere for the subordinate sales consultants that will promote increasing sales and high moral \*Devise and carry out marketing plans to include advertising & promotions that will ensure growth and sales \*Recognize customer needs and limitations through brief descriptions provided by sales consultants \*Request and accept dealer trades that will satisfy a multitude of parties involved \*Interact with the public on a constant daily basis in a positive, friendly, honest manner \*Create and maintain a consistent marketable lot that will stimulate sales and growth through consumer tracking, market trends, and analyzing area economic status

United States Marines, March 1982 - July 1986 (Medical Administration Specialist)

\*Decipher doctor-prepared patient charts and type them for future reference \*Monitor, maintain, file, and organize patient records to ensure quality care \*Operate all office equipment to include multi-line telephone, computer, printer, copy machine, facsimile machine

## EDUCATIONAL BACKGROUND

University of Miami, Miami, Florida - December 1989, Used Vehicle Management

Ford Division Increasing Sales through Prospecting Course - April 1987

Ford Division Compact and Full-Size Light Truck Selling Course - March 1987

Ford Division National Walk Around Course (First place in competition) - February 1987

Roger Bolt Advance Sales Course - October 1986

Roger Bolt Professional Sales Course - November 1986

Alpena Community College, Alpena, Michigan - September 1981-June 1982, Business Management

\*Psychology \*Public Speaking

Central High School, New York, New York - September 1981-June 1982

\*Algebra \*Geometry \*Accounting \*English \*Government \*Economics \*History \*Social Studies

## SPECIAL QUALIFICATIONS

\*Ford Division Legend Leaders 300/500 Leadership Recognition Award 1995 \*Top 10% Customer Satisfaction Diplomat Society Honors 1991, 1992, 1993, and 1994 \*Ford Division Recognition for being the Top Salesperson for Alpena Ford 1990, 1991, 1992, 1993, promoted to Sales Manager in 1994 \*Ford Division Recognition for being the Top Salesperson for Pine Country Ford 1986, 1987, promoted to Sales Manager in 1988 and in 1989 won Ford Division Professional Sales Managers Award, Top 10%

## OUTSIDE INTERESTS

\*Sunday School Teaching \*Camping \*Horseback Riding \*Participating in outdoor activities with family \*Gardening \*Handy work around the house

## REFERENCES AVAILABLE UPON REQUEST

### Summary of Predictive Index Results

Name: Ben Heath

Survey Date: June 12, 1996

Report Date: June 24, 1996

Ben is an engaging, stimulating communicator, poised and capable of projecting enthusiasm and warmth, and of motivating other people.

He has a strong sense of urgency, initiative, and competitive drive to get things done, with emphasis on working with people in the process. He understands people well and uses that understanding effectively in influencing and persuading others to act.

Impatient for results, and particularly impatient with details and routines, Ben is a confident and venturesome “doer” and decision-maker who will delegate details and can also delegate responsibility and authority when necessary. Ben is a self-starter who is skillful at training and developing others. He applies pressure for results, but in doing so, his style is more “selling” than “telling.”

At ease and self-assured with groups or in making new contacts, Ben is gregarious and extroverted, has an invigorating impact on people, and is always “selling” in a general sense. He learns and reacts quickly and works at a faster-than-average pace. Able to adapt quickly to change and variety in his work, he will become impatient and less effective if required to work primarily with repetitive routines and details.

In general terms, Ben is an ambitious and driving person who is motivated by opportunity for advancement to levels of responsibility where he can use his skills as team builder, motivator, and mover.

## MANAGEMENT STRATEGIES

To maximize his effectiveness, productivity, and job satisfaction, consider providing Ben with the following:

- \* Opportunities for involvement and interaction with people
- \* Some independence and flexibility in his activities

- \* Freedom from repetitive routine and details in work which provide variety and change of pace
- \* Opportunities to learn and advance at a fairly fast pace
- \* Recognition and reward for communications and leadership skills demonstrated
- \* Social and status recognition as rewards for achievement.

Prepared by: John Harper  
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## PETER JAMES

### OCCUPATIONAL GOAL

Seeking employment with a professional establishment that provides a challenging stimulating work atmosphere to individuals who demonstrate a positive self-starting attitude.

### WORK EXPERIENCE

- Alpena Ford Mercury, 1/17/95-Present Employer (Automotive Appearance Enhancement Technician) \*Clean and detail engine compartments. \*Strip excess finishes and imperfections with low RPM power wheel. \*Repair minor scratches and discolorations of surface paints. \*Rustproof over spray removal. \*Paint Protection application. \*Apply new finishes. \*Perform interior cleaning and minor repair. \*Apply dye to carpets and upholstery. \*Operate industrial debris extractor. \*Apply after market and OEM accessories.
- American Waste Systems, 1/14/94-11/9/94 (Route Coordinator) \*Maintain continuity of 10 collection routes by filling in and training new drivers for routes with short callings. \*Organize route changes for maximum efficiency and make changes in computer automated route sheets. \*Complete route audits and analysis.
- Jackson's Disposal Service Inc., 1/6/91-1/13/94 (Collection Route Driver) \*Operate manual and automatic transmission heavy trucks \*Operate Clark Pneumatic Forklift. \*Operate industrial recycling equipment such as cardboard baler, paper shredder, and glass crusher. \*Operate FCC licensed two-way radios. \*Operate front end loaders.
- Holiday Inn of Alpena, 7/11/90-10/12/90 (Night Auditor) \*Investigate cashier discrepancies \*Credit card collection. \*Complete computer automated audits. \*Computer interfacing. \*Accounts Payable/Receivable. \*Word processing. \*Facsimile sending & receiving \*Modem communication. \*Automated telephone switchboard operation.
- United States Marines, 8/9/84-2/23/90 (Food Service Shift Leader, 4/1/89-2/20/90) (Shift Supervisor 3/10/88-4/1/89) (Night Auditor 1/1/86-3/10/88) (Desk Clerk 10/15/84-1/1/86) \*Operate Wang Mainframe Computer. \*Operate NCR cash register. \*Utilize manual and computerized telephone switchboards. \*Prepare City Ledger Accounts. \*Accounts Payable/Receivable. \*Bank deposits. \*Assign Duties. \*Prepare schedules. \*Train personnel on computer. \*Complete employee performance reports. \*Meal preparation and stock ordering. \*Calculate amount of food required for each day's consumption.

**EDUCATIONAL BACKGROUND**

- ASB Leadership School, June 7, 1989-July 6, 1989 \*People/Resource Management
- Alpena Community College, August 28, 1988-June 1, 1989 \*Mathematics \*Music
- Community College of the Marines, October 15, 1984-February 23, 1990 \*Hotel/Restaurant Management
- Alpena High School, September 1, 1982-June 1, 1984 [Diploma 3.5 GPA] \*Accounting \*Algebra \*Art \*Geometry \*English \*Drafting \*Physics

**SPECIAL QUALIFICATIONS**

\*Own and operate Acer 7100 personal computer with Microsoft Windows/Works & MS DOS. Also Installed Drivers for a Canon BJC 4000 Ink Jet Printer that is used with this computer. \*Clean driving record with a commercial Class B endorsement. \*Own & operate various Multi-Track sound recorders and mixers. \*Perform extensive automobile repair & Car Stereo installations.

**OUTSIDE INTERESTS**

\*Playing Guitar \*Sound Recording \*Operating my personal computer \*Electronics \*Automobiles \*Home remodeling

**REFERENCES AVAILABLE UPON REQUEST**

## Summary of Predictive Index Results

Name: Peter James

Survey Date: September 11, 1996

Report Date: September 11, 1996

Peter is an intense, results-oriented, self-starter, whose drive and sense of urgency are tempered and disciplined by his concern for the accuracy and quality of his work. His approach to anything he does, or is responsible for, will be carefully thought-out, based on thorough analysis and detailed knowledge of all pertinent facts.

Strongly technically oriented, he has confidence in his professional knowledge and ability to get things done quickly and correctly. With experience, he will develop a high level of expertise in his work and will be very aware of mistakes made either by himself or anybody doing work under his supervision. Peter takes his work and responsibilities very seriously and expects others to do the same.

In social matters, Peter is reserved and private, with little interest in small talk. His interest and his energy will be focused primarily on his work and, in general, he is more comfortable and open in the work environment than he is in purely social situations. In expressing himself in his work environment he is factual, direct, and authoritative.

Imaginative and venturesome, Peter is a creative person, capable of developing new ideas, systems, plans, or technology, or of analyzing and improving old ones. He relies primarily on his own knowledge and thinking, with little reference to others, relying as much as possible

on himself alone to get things done. He will find it difficult to delegate, feeling strongly that if he is to be sure that something is done right, he must do it himself.

When, as a supervisor, it may be necessary for Peter to delegate details, he will follow up very closely and will be quick to spot and correct mistakes. His primary concern is to get things done right and quickly, and in accomplishing that goal he will be demanding of himself and others. While he may be perceived by other people as a rather aloof person, he will earn their respect for his knowledge of his work and the soundness of his decisions.

### MANAGEMENT STRATEGIES

To maximize his effectiveness, productivity, and job satisfaction, consider providing Peter with the following:

- Opportunities to broaden the technical knowledge of his work with learning experience in increasingly responsible positions
- As much autonomy as possible in expressing his ideas and putting them into action
- Recognition for tangible results obtained, rather than for political or selling skills

Prepared by: John Harper

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### MARGERIE HEATH

#### CAREER GOAL

To contribute the skills and abilities needed in the successful formation and continued operation of a profitable business.

#### WORK EXPERIENCE

Henderson Real Estate, June 1996-Present - Smith Realty, May 1987-June 1989  
[Receptionist/Sales Agent]

\*Receive and route phone calls \*Arrange and store of documents \*Prepare legal documents and business forms with word processor \*Greet customers \*Build and maintain a customer base \*Identify the needs of customer requests \*Present a list of available options \*Conduct tours of properties of their interests \*Acting as Liaison between Seller and Buyer to reach a result which is suitable to all parties

Hidden Valley Resort, June 1984-May 1996 - Duchess Inn, July 1987-January 1989 (Waitress/Hostess/Bartender/Supervision)

\*Provide people a with warm, friendly atmosphere \*Take orders and relay them to the kitchen staff utilizing a data processor \*Fulfill orders and beverage requests in a quick and orderly manner \*Monitor dining area and recognizing patrons' needs \*Prepare guest check on computer \*Process payment and provide correct change to guest \*Recognize personnel shortages and take necessary action \*Delegate responsibilities to co-workers \*Train new personnel \*Credit card collection \*Prepare bank deposits

**EDUCATIONAL BACKGROUND**

Michigan State University, September 1984-February 1987 \*Business Administration/ Psychology

Northern High School, September 1980-June 1984 \*Business \*Accounting \*Algebra \*Geometry \*Pre-Calculus \*English \*Typing

**SPECIAL QUALIFICATIONS**

\*Maintain a valid real estate license \*Teach Sunday School Courses \*Full-time parent  
\*Outgoing \*6 year Cheerleader \*Awarded for top monthly sales October 1995 \*Caring  
\*Enthusiastic

**OUTSIDE INTERESTS**

\*Camping \*Riding bike \*Participating in outdoor sports of all kinds \*Cooking \*Playing cards  
\*Gardening

**REFERENCES AVAILABLE UPON REQUEST**

## Summary of Predictive Index Results

Name: Margerie Heath

Survey Date: July 10, 1996

Report Date: July 10, 1996

Margerie is a patient, stable, and cooperative person who will do her work as instructed and will depend on management and professional training to provide the necessary guidelines. She has the patience and tolerance required for routine work and can be relied on to do such work consistently and in a relaxed manner.

She will focus on the details of her work and will handle them with somewhat better-than-average accuracy. In work involving repeated contact with people, Margerie will be pleasant and agreeable, helpful and cooperative. She derives satisfaction from being of service to others, works comfortably under close supervision, and likes to feel part of a secure team.

Fairly easygoing, Margerie works at a steady, relatively unhurried pace and is comfortable doing the same things in the same way repeatedly. In the event of change in her work and responsibility, she needs to be given time to learn the new work thoroughly, which is best done with some opportunity for practice. Once having learned, she retains well.

In social terms, Margerie is unassuming, friendly and pleasant in general contact. She is a patient and willing listener, particularly with people she knows well and with whom she feels at ease.

Dependably consistent and steady in her work habits, Margerie will need close support and encouragement from supervision when she is required to work under pressure or in changing conditions.

**MANAGEMENT STRATEGIES**

To maximize her effectiveness, productivity, and job satisfaction, consider providing Margerie with the following:

- Thorough, careful training in all detailed aspects and routines of her job
- Opportunity for repetitive practice doing what she has been trained to do
- A stable, familiar work environment and organization, with assurance of security provided by helpful, supportive management
- Expressions of recognition for long service, cooperation and work well done
- Assurances of stability, security, and continuity of relations with familiar coworkers

Prepared by: John Harper

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